Hi planning.implementation@delwp.vic.gov.au

There has been a submission on Planning for Melbourne’s Industrial and Commercial Land through Engage Victoria

A copy of the submission is provided as below:

Planning principles and strategies for employment land.

The draft Melbourne industrial and commercial land use plan includes principles and strategies to guide planning for industrial and commercial land. (page 32).

Do you think the principles and strategies provide enough clarity and guidance to assist planning for industrial and commercial land?

No

If no, please let us know why and how they could be improved.

We reserve our right to make future comment on this. Refer to attached submission letter.
Criteria to identify regionally-significant industrial precincts.

Plan Melbourne identifies state-significant industrial precincts. The draft Melbourne industrial and commercial land use plan identifies regionally-significant industrial precincts and includes criteria used as the basis to identify these locations (page 34).

Do you support the criteria developed to identify regionally-significant industrial precincts?
No

If no, please let us know why and how they could be improved.
We reserve our right to make future comment on this. Refer to attached submission letter.

Purpose for regionally-significant industrial precincts and local industrial precincts.

Plan Melbourne outlines a purpose for state-significant industrial precincts. The draft Melbourne industrial and commercial land use plan identifies a purpose for regionally-significant industrial precincts and local industrial precincts (page 35).

Do you support the purpose developed for regionally-significant industrial precincts and local industrial precincts?
No
If no, please let us know why and how they could be improved.

We reserve our right to make future comment on this. Refer to attached submission letter.

Developing local industrial land use strategies.

Appendix 2 of the draft Melbourne industrial and commercial land use plan proposes guidance for developing local industrial land use strategies.

Do you have any comments or suggestions to improve the guidance for developing local industrial land use strategies?

We reserve our right to make future comment on this. Refer to attached submission letter.

Key industrial and commercial areas.

The draft Melbourne industrial and commercial land use plan identifies and describes key industrial and commercial areas for each of the six metropolitan regions (refer to Part B of the plan).

Have the key industrial and commercial areas been adequately identified and described across the regions?

No

If no, please let us know which other area we should identify or how the areas can be better described.

We reserve our right to make future comment on this. Refer to attached submission letter.
Would you like to comment on any other aspects of the plan?

We reserve our right to make future comment on this. Refer to attached submission letter.

If you would like to upload a submission, please do so here.

I am making this submission:

on behalf of a land owner

Email address (Optional)

I agree to receive emails about my submission if required or project updates.

Yes

Privacy Statement - Draft Melbourne Industrial and Commercial Land Use Plan

What we will do with your submission

The Department of Environment, Land, Water and Planning (DELWP) is committed to protecting personal information provided by you in accordance with the principles of the Victorian privacy laws. The submission you provide to DELWP will be used to inform the finalisation of the Melbourne Industrial and Commercial Land Use Plan.
The information you provide will be made available to DELWP to develop a consultation report. This report will be uploaded to the Melbourne Industrial and Commercial Land Use Plan page on the DELWP website.

The contact information you provide may be used to contact you should we need to clarify your submission or to provide you with project updates.

The submission you provide will be published on the DELWP website. To protect individual privacy, DELWP will remove your name and address from your submission when we receive it.

If you do not wish to be identified, please ensure there is no other information in your submission that could identify you or other individuals.

If you are making comment as an organisation, then your comments may be published, including the name of your organisation.

De-identified submissions may be used by DELWP, or its contracted service providers under confidentiality agreements, in preparing its recommendations to government.

Please note, if you do not provide your name/email address we will not be able to identify your submission if you wish to access it, make a correction, or require technical support.

Should you need to correct the information you provided or gain access to your submission, please contact us via email at planning.implementation@delwp.vic.gov.au

I agree to the privacy statement

yes

To view all of the form’s submissions, visit:


Regards,
The Engage Victoria Team
Dear DELWP,

Draft Melbourne Industrial and Commercial Land Use Plan
Submission on behalf of YourLand Developments for Lecky Road, Officer South

1. Introduction

Tract acts on behalf of YourLand Developments with respect to the draft Melbourne Industrial and Commercial Land Use Plan (MICLUP). YourLand are the owners of land at Lecky Road, Officer South (the Site) which is located in the future Officer South Employment Precinct Structure Plan (PSP) area.

YourLand is aware of the MICLUP and following a review of the content of details wish to make a submission in relation to the Draft Plan.

This submission aims to ensure that the planning mechanisms which guide land use and development for the Officer South Employment precinct support economic viability, while allowing flexibility to determine future land uses in order to achieve the best land use outcomes for this precinct and the neighbouring precincts of Cardinia South and Officer.

YourLand and Development Victoria have been working with the Victorian Planning Authority and in early 2019 committed to funding the current PSP analysis and preparation process.

Whilst the South East Growth Area Plan has established the broad framework for the future Officer-Pakenham State-Significant Industrial Precinct (SSIP), the Precinct Structure Planning process now underway will assess and evaluate the wide range of issues that need to be considered both at regional and local levels.

This submission requests further consideration of the boundaries shown for the future SSIP at Officer South and for the Officer South Employment PSP process (which is currently underway) to assist in informing a more considered boundary that responds to the detailed work underway (as further outlined in the submission). It also seeks to have the strategy integrate with the Growth Corridor Plans to inform consistent future PSPs.

This is supported by the following detailed submission.

2. Context

The land at Lecky Road, Officer South is within the future Officer South Employment PSP area and is currently identified in the future Officer-Pakenham SSIP. It comprises two parcels of land and is approximately 81.37 hectares in area.
The Site is located immediately to the west of the residential area of the Cardinia Road Employment PSP. This PSP provides for a component of a residential community adjacent to the Officer South Employment Precinct.

North of the Site and Officer South Employment PSP area is the Princes Freeway and further north (across the Princes Freeway) is land which is a part of the Officer Precinct Structure Plan. A key component of the Officer PSP is the town centre which is identified as a major town centre in the South East Growth Corridor Plan and key strategic planning documents, including Plan Melbourne 2017-2050.

![Site Context Plan](image)

The Site is located within the Victorian Planning Authority’s (VPA) South East Growth Corridor Plan and is within the Officer South Employment PSP area, currently being prepared by the VPA. The high level South East Growth Corridor Plan nominates the Officer South Employment PSP largely as industrial use with significant ‘Business with Residential’ (refer to Figure 2).

Within the South East Growth Corridor Plan are a number of PSP areas which have been approved and have begun to be realised. Key surrounding neighbourhoods in the local and broader context include the Cardinia Road Employment PSP which has a residential interface with the site, the Officer PSP, Cardinia Road Employment PSP, Clyde North PSP, Cardinia Creek PSP and Thompsons Road PSP.
The MICLUP establishes a broad planning framework to enable state and local governments to better plan for future employment and industry needs. Consistent with Plan Melbourne 2017-2050, the MICLUP identifies the Site as future State-Significant Industrial Land (SSIL), as per Figure 3, but acknowledges that the PSP process will resolve key strategic approaches to land use decisions.

In terms of industrial land, the draft Plan specifies that the southern region has approximately 3,510 hectares of vacant zoned and unzoned industrial land available for development. Of this land, approximately 1,280 hectares is located within the future Officer-Pakenham SSIP. Land supply in other SSIPs is expected to become constrained in mid-2020s, and as such development is expected to progressively move to the Officer-Pakenham SSIP as land in these areas is exhausted.

In regard to commercial floor space, the Plan estimates that an additional 250,100 square metres of commercial floor space will be required in Cardinia between 2016 and 2031.

In terms of proposed future planning frameworks, the MICLUP seeks to retain significant industrial precincts and protect them from encroachment from sensitive uses that may compromise development and efficient operation of businesses in these locations, a position which is supported.

A review of the MICLUP indicates that the land use directions are broadly consistent with Plan Melbourne 2017-2050 and does not propose a significant change in terms of future land use directions for this area of Officer South.
Map 12: Southern Region future direction map - industrial land

Source: Department of Environment, Land, Water and Planning

Figure 3 = MCLUP Future Directions Map for the Southern Region
4 Concept for Officer South

The Victorian Planning Authority (VPA) has commenced the Officer South Employment PSP. The PSP will be informed by workshops commencing in 2020. Following the commencement of the PSP process, a high level vision for the Precinct has been developed which demonstrates how the Officer South Employment Precinct could provide for a diversity of jobs and services and complete the existing residential community within the Cardinia Road Employment PSP to the east, without compromising the supply of industrial land.

The Cardinia Road Employment PSP makes no provision for a primary school and active open space essential to the creation of new communities, contrary the Strategic Guidelines for Growth Area Community Creation. It is noted that the small residential community is isolated and poorly serviced.

Plan 5. Future Urban Structure

![Diagram]

Figure 4 - Cardinia Road Employment PSP Future Urban Structure

A concept for Officer South seeks to provide for a diverse range of employment opportunities while allowing for the completion of the small residential area east of Gum Scrub Creek. It envisages an integrated employment and residential area in the north of the PSP area while delivering “traditional” industrial and logistics in the south of the PSP, as envisaged by the South East Growth Corridor Plan. The vision for the Officer South PSP is presented in the high level concept plan at Figure 5.
Figure 2 – Officer South Concept Plan

Core industrial land is able to be created in the southern and western areas of the precinct while an area capable of providing for high value employment activity is proposed for the area in proximity to the existing freeway interchange and train station. Mixed-use employment precincts are an option along the north-western boundary, providing a high quality visual amenity gateway into the Officer South Employment Precinct. Furthermore, business and mixed use transitional zoning is proposed around the residential community, protecting the sensitive uses while ensuring areas for industrial are provided with suitable buffer distances.

The residential community component mirrors that to the east of the Gum Scrub Creek Reserve within an envelope that is bounded by the Princes Freeway to the north, the APA gas easement to the south and Officer South Road and drainage corridor to the west. This residential community completes the residential community proposed as part of the Cardinia Road Employment Precinct Structure Plan, delivering the provision of education, open space and community facilities.

Significantly, the concept, which presents an adaption to land uses within the growth corridor plan, delivers overall the same mix of land use and retains the same amount of employment dedicated land use.
5 Policy Support for the Vision

As the Officer South Employment Precinct is currently going through a PSP process which will clarify the required future urban structure, it is important that the MICLUP does not prevent the ability for the PSP to deliver the most appropriate mix and location of a variety of use outcomes for the precinct. Specifically, the MICLUP needs to allow the flexibility for the PSP process to create liveable communities with effective employment opportunities over the long term.

In regard to the above, the current PSP process enables an opportunity to develop a clear vision and highlights an outcome for this. In summary:

- **The proposed land use vision for the Site and Officer South Employment Precinct provides an outcome which is supported by current planning policy**

The proposed land use vision provides an outcome that aligns with current planning policy in relation to creating mixed use neighbourhoods that offer more choice in housing, creation of jobs and delivery of better access to services and facilities.

The concept is supported by Plan Melbourne 2017-2050 which seeks to achieve stronger integration and proximity between different land uses, with the objective of providing employment and services closer to where people live and aims for residential communities to be better serviced at a local level.

Specifically, the vision responds to Actions 12 and 13 by planning for future employment growth, creating a diversity of employment opportunities and ensuring that the land designated for employment can be considered for appropriate uses.

Furthermore, the vision is supported by the directions and initiatives of the metropolitan strategic document in regard to creating ‘20 minute neighbourhoods’ – giving people the ability to meet most of their everyday needs within a 20-minute walk, cycle or local public transport trip from their home. The Officer South Employment PSP will assist in creating an integrated community, securing jobs within the wider Officer and Pakenham corridor, and complete a viable residential community close to existing services, jobs and public transport.

Policy 2.1.1 of Plan Melbourne 2017-2050 seeks to ‘facilitate an increased percentage of new housing in established areas to create a city of 20-minute neighbourhoods close to existing services, jobs and public transport.’ The vision for the Officer South Employment PSP as proposed in the Concept Plan supports this by providing the best strategic utilisation of land within the UGB. As demonstrated in the attached analysis prepared by MacroPlan, within Cardinia there is less than 10 years of residential land supply. Through creating a viable residential community, the Officer South Employment PSP will assist in maintaining Melbourne’s UGB while protecting the values of non-urban land.

- **Recognition of the Growth Corridor Plan Objectives**

Part of the discussions between the VPA and YourLand have been based around the fulfillment of policy objectives for the drivers of employment land and allowing the residential community within the neighbouring Cardinia Road Employment PSP to the east to be completed while maintaining the same land area dedicated to employment outcomes.

The Cardinia Road Employment PSP makes for provision for a residential community with approximately 86 hectares of residential land. While a residential community is proposed it is noted that this PSP is outdated and not in line with the current PSP guidelines and is isolated due to the location of surrounding industrially designated land on its northern, eastern and southern boundaries.

Furthermore, the Cardinia Road Employment PSP makes no provision for schools, sports oval or higher order community centre and is isolated from those services in adjoining neighbourhoods as a
result of its location south of the Freeway. Apart from the small-scale community facilities proposed, residents of this community depend on crossing the freeway and travelling up to two kilometres to access these services.

The current guidelines for Precinct Structure Plan establish a benchmark for building urban residential communities and establishing them around the population of a size between 7,000 and 12,000 people. As a general rule, the benchmark of 10,000 population is used for the provision of essential community infrastructure.

The Cardinia Road Employment PSP creates a residential precinct of approximately 4,285 people. To reach what is considered a viable residential community, an additional 5,000 people will be required. As such there is a clear need for an expanded residential area.

The Officer South Employment PSP presents an opportunity to complete this residential community by providing additional residential land west of the Gum Scrub Creek reserve. This would enable the provision of services and facilities (school, community centre, public open space) to a residential community which is anticipated to be physically isolated and underserviced with essential community infrastructure.

The proposed residential community will also assist in providing further support to the Officer Town Centre. The Officer Precinct Structure Plan identifies the requirement for the Officer Town centre to be a Major Activity Centre with a regional retail function and a diversity of discretionary and higher-order good and services. In regard to floor space the PSP details a quantum of 43,000 square metres of retail shop floorspace within the Officer Town Centre.

As specified in a previous study undertaken by MacroPlan, a centre at the scale envisaged for the Officer Major Town Centre would typically require a main trade area population of over 100,000 in order to successfully trade. With a population of approximately 72,000 projected within the main trade area, the scale of the Officer Major Town Centre as envisaged by the Officer PSP may not be viable over the next two decades.

While located south of the Freeway, the Gum Scrub Creek reserve acts as a natural central spine accessway to the town centre for future residents of the Officer South Employment PSP. Furthermore, a future PPTN route is proposed along Officer South Road which will provide a strong connection to the town centre.

As such, the provision of a residential area as proposed in the Officer South Employment Precinct Concept Plan will assist in boosting the overall residential population of the area and will support the viability of the Officer Town Centre.

6 Retention of Employment Land

While the site is designated as a future SSIP in Plan Melbourne and the draft MCLUP, it is the balancing of the local community requirements in conjunction with the Cardinia Road Employment PSP that needs to be better assessed in the current PSP process.

Establishing new employment within growth areas is a challenge to achieve and innovative, new solutions are required into the future. Given the Site’s key location south of the Princes Freeway, the opportunity to establish precincts to satisfy the desire for high order services, for example education, health, office and hi-tech research is possible at this location with a well-considered PSP process. The Vision for Officer South delivers a significantly improved employment outcome than if the land south of Lecky Road were to be identified for industrial use only.
The concept for Officer South seeks to provide for a diverse range of employment opportunities delivering an integrated employment area in the north of the PSP, while delivering industrial uses in the south of the PSP as envisaged in the South East Growth Corridor Plan.

Figure 6 provides a comparison between the concept for the Officer South PSP area, prepared by Tract Consultants and is a land area calculation applied to the PSP area comparing the 2012 land budget with the concept plan land budget.

While the land use mix does slightly vary from the Growth Corridor Plan in response to more recent economic modelling, the fundamental elements of the corridor plan are still retained in the concept. The total amount of land dedicated to employment remains the same (with a changed mix between 'Commercial' and 'Industrial').

Previous analysis undertaken by MacroPlan indicates that, based on the existing baseline and average residential and employment densities demonstrated in the PSPs for surrounding areas, the Officer South Employment PSP is expected to provide capacity for approximately 3,987 residential dwellings and 34,038 jobs. The analysis also indicates that the draft urban structure presented provides a significantly increased employment capacity outcome and improved capacity for conventional residential dwellings, supporting the ongoing residential growth needs in the local area. Specifically, it provides for an additional 348 dwellings (4,323 total) and 11,294 jobs (45,332 total).

Based on the findings of MacroPlan, an increased resident population is also expected to stimulate demand for regional services, such as health and education, to be located within the PSP area reinforcing the level of employment and enabling residents to live and work within the region or close to home.

Following the PSP process, it is likely that the boundary of the future Officer-Pakenham SSIP would need to be adjusted to reflect the suggested location of land in Figure 5 to facilitate the proposed land use structure.
Specifically, industrial land uses should be directed to the area in the south of the corridor, furthest from existing and future residential areas creating key commercial interfaces with the community. This location also allows the future industrial uses to be focused around major transport routes, such as Thompsons Road.

While the existing physical barriers such as the Gum Scrub Creek reserve offer a slight buffer from the residential uses, the proposed urban structure provides suitable buffers, such as mixed use and commercial areas which can maximise economic potential and provide a place for industrial uses to establish.

Significantly, a further explanation of employment land use demands and opportunities by MacroPlan (attached to this Submission), for YourLand, has presented the following findings:

- The key principles and framework of the MICLUP point to the current plan to focus future industrial development into concentrated nodes with long term protection from alternative uses. The significant proportion of the Southern region supply that is listed as state significant or future state significant will limit the corridor's options to support innovation as outlined in the fourth key principle.
- A significant majority of Melbourne's future industrial land is in the north and west, with the Port of Hastings designated primarily for industries supporting deep water port activities. This will be primarily freight and logistics and manufacturing.
- The significant supply and infrastructure development planned in the west and north are likely to absorb most of the freight and logistics demand, especially as the intermodal freight facilities (Western Intermodal) in the area begin development. The Western Intermodal business case is currently underway.
- The MICLUP lists access to the Officer-Pakenham corridor as great via its proximity to freeways and highways but fails to address travel times and distances associated with travelling to the precinct, which is 55km from the CBD, 20km further than the SouthernSSIP. These have significant implications for the attractiveness of the precinct for freight and logistics uses.
- The MICLUP has an expectation that regionally significant and large format uses would progress to the Officer-Pakenham SSIP. However, given the much smaller size of the Officer-Pakenham corridor and restricted workforce of the Officer/Pakenham Corridor it is likely to primarily attract demand from regional and local industry.
- The designation of Officer South as state significant future will delay the development of Officer South significantly and deprive the municipality of the required space to deliver a large enough catchment to support local white-collar jobs and combat low rates of employment self-sufficiency.
- The MICLUP identifies the Casey-Cardinia area as primary drivers for commercial land demand, with identified land to be almost exhausted prior to 2031. If population growth continues past 2031 in line with Victoria in future forecasts (2019) the region will grow by 10% between 2031 and 2036, adding over 60,000 residents. Based on this growth, additional commercial space will need to be allocated to support this growth and growth due post 2036.
- In the Southern region, an additional 132,000 jobs are forecast to be created between 2016 and 2031, of which approximately 95% of the jobs are in services, retail or construction industry, with a very small number of 'manufacturing and industrial' jobs overall. Therefore, there is very limited demand for large floor plate development as envisaged by MICLUP.
- The Southern region's listed key industries do not include Freight and logistics, likely due to the relatively low job density that the industry creates and lower relevance the area has to the future freight network of Melbourne. This accords with MacroPlan's internal research which indicates that demand for freight and logistics is likely to be limited.
- In the Casey-Cardinia area, approximately 10% of employment growth is expected to occur in 'manufacturing and industrial' jobs, which means that the workforces developing in these municipalities
do not match the distribution of land use types in the MCLUP. This means that education, health, retail and professional services are the key to the southeast corridor.

• The MCLUP, if followed, puts the Southeast corridor at risk of having a large proportion of 'theoretical jobs' relative to active jobs. This is accentuated by the likely exhaustion of commercial and residential land in the municipalities within 15 years, relative to the close to 40 years of supply of industrial land.

• The MCLUP’s statement that the region is already feeling the pressure from demand for non-industrial land uses indicates that there is a sensitivity towards ensuring that the wider needs of the corridor are not overlooked, which includes ensuring that there is enough commercial land supply in the medium and longer term.

• The MCLUP points out that the key underlying goal behind their decision to ‘set aside’ some currently non-industrial areas for industrial use is to maintain long-term employment opportunities. The report does not consider the timeline of the delivery of these opportunities.

• The MCLUP outlines a specific interest in knowledge-based jobs, which requires both public and private engagement in fringe areas such as Officer South.

• The key guidelines of the MCLUP outline specific areas where industrial land is to be retained, which doesn’t include Officer South. The guidelines also include a commitment to investigate and identify areas that could support other employment uses (i.e. offices, creative industries and innovation industries) in areas with good connection to the transport network, such as in Officer South.

7 Recommendations for the MCLUP

The Officer South Employment PSP presents an opportunity to provide an adaptable land use framework that provides job creation and a design response that not only addresses current demand and modelled trends overall, but also responds to the locational opportunities and constraints with the objective of being able to accommodate change.

Overall, YourLand does not have any opposition to the MCLUP or its position that future industrial land is required in Cardinia, however based on the above we request the following:

1. Flexibility to adapt and adjust land use boundaries for designated uses needs to be built into the final MCLUP. Opportunities and issues requiring resolution will emerge that will necessitate rezoning that cannot be fully anticipated at the time of writing. Providing overall land use dedicated to employment is not compromised.

2. The MCLUP should acknowledge that the VPA has been directed to undertake project planning specific to the PSP area and as such, resolution of future land uses for the site and broader precinct will be determined through the PSP process which is currently underway. The final MCLUP should further refine the planning framework for industrial land so that it is acknowledged that the PSP process will have regard to local context, site constrains and opportunities and will have the ability to address all other policy needs.

3. The SSIP boundaries need to be identified as indicative boundaries with an emphasis on detailed definition at the completion of the PSP process. A stronger emphasis should be placed on land area total to dedicated land uses.
Summary/Conclusion

The draft MICLUP is a critical document that underpins the future direction of the development of the Site and the Officer South Employment PSP. It is therefore important for DELWP to adequately consider the potential impact the strategic designation of land has on the future of this precinct.

YourLand seek a review of the extent and location of industrial land as it relates to [redacted] Lecky Road, Officer South and the broader Officer South Employment PSP area. Our client also reserves their right to make further submissions on any matter that may be of interest to them including in response to any other submissions which may be made by any other party.

We look forward to the Department's consideration of this matter and would be happy to discuss our submission with you. Should you have any queries or require further information, please do not hesitate to contact the undersigned. [redacted]

Yours sincerely

[Signature]

Director of Town Planning
Tract

Attachments:
Attachment A: Critical Assessment of Draft MICLUP [MacroPlan]
Officer South

Critical Assessment of Draft MICLUP

PREPARED FOR YourLand

20 December 2019
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Executive summary

I. This report was prepared for YourLand Developments Pty Ltd (the owner) by MacroPlan Dimasi (the author). It provides an assessment of the Draft Melbourne Industrial and Commercial Land Use Plan (MICLUP) in addition to an update to the findings of our previous reports.

II. The Draft MICLUP outlines DELWPs most up to date view on the future of commercial and industrial land uses in Melbourne. As part of this process, it has outlined general plans for several areas in Melbourne which had previously lacked finalised Precinct Structure Plans, Officer South is an example.

III. Officer South has received a previously undefined designation – State Significant Industrial Land. This designation remains undefined in the document. We have assumed this to mean that it will at some point become part of a State Significant Industrial Precinct (SSIP). The timeframe of this transition is not made clear.

IV. The Casey-Cardinia Corridor should be designated as Regional and Local industrial precincts. MICLUP employment projections suggest that less than 10% of the workforce will be involved in industrial uses such as manufacturing and freight and logistics.

V. Officer South has significant potential to support the development of the Southeast corridor, however the land will remain vacant for decades under a business as usual scenario. This is in the context of less than 10 years of identified residential land left within the corridor.

VI. It is unlikely that there will be significant transfer of demand from the Southern SSIP to Officer/Pakenham as the focus of freight and logistics (the primary growth use for industrial and in Melbourne) in Melbourne has shifted west. The exhaustion of land in the Southern SSIP within the next 5-10 years could see 30% of its demand shift to Officer Pakenham, but this is dependent on the economics of travelling 20km to a destination point and 20km to a distribution point.

VII. In the proposed scenario based on our modelling, Officer South could deliver 45,332 jobs in the long term with approximately 32,000 jobs active by 2031. This compares to 19,000 active jobs under the future SSIP scenario.

VIII. There is a clear need for significant development of anchor white collar job sites in Cardinia to address the high proportion of workers travelling over an hour to their place of work. The 20-minute neighbourhood policy objective requires a balance between residential needs, commercial needs and industrial needs guided by economic realities.

IX. Officer South would grow rapidly as well as produce 1,000 more and higher value jobs under a public-private partnership (PPP) scenario, where high value clusters could be master planned and rolled out in conjunction with mixed use which would then drive demand for the industrial land.
X. The Officer Town Centre is likely to require a catchment of 100,000 people in order to be viable. Current estimates of final population within the catchment based on the Southeast Growth Corridor Plan are 72,000. More residential is therefore required to support the viability of the corridor.
Introduction

Macroplan was engaged by Yourland to assist Tract in the development of a submission to the Melbourne Commercial and Industrial Land Use Study. This report will relate specifically to our previous reports, to the updated population projections and to the Draft Melbourne Commercial and Industrial Land Use Plan (MICLUP).

The MICLUP outlines DELWP's view of the future of commercial and industrial space in Melbourne and aims to embed a series of guiding principles into its planning process which include primarily basic things such as ensuring that there is enough supply of these land use types, protecting already significant areas and promoting innovation.

Officer South has, until the release of the draft MICLUP report, remained devoid of specific plans regarding its development. The Southeast Growth Corridor Plan divided the area into a mixed-use precinct facing the Princes Freeway and an industrial precinct further south. The Urban Development Program 2018 confirms the positioning of the industrial land in the area but does not estimate the residential component. The area is not currently subject to a PSP and therefore has not undergone the rigorous process which is usually implemented in order to assess the precinct's potential with regards to the needs of the corridor and the surrounding areas.

This report will examine the Draft Melbourne Commercial and Industrial Land Use Plan and its implications for Officer South, the Cardinia-Casey corridor and the wider Southern Region. Later sections will also examine the impact that the plan, as well as revised government forecasts, has on previous Macroplan reports and estimate the difference this makes to our recommendations.
Section 1: Critical Review of the Draft MICLUP
The Melbourne Commercial and Industrial Land Study outlines a framework for non-residential development in Melbourne for the next few decades. The goal of the plan is to establish an outline for development that delivers on State Government Planning Objectives for both these areas and the wider City of Melbourne.

DELWP outline the following key principles to guide the MCILUP process:

1. Planning for industrial and commercial land should ensure adequate long-term land supply is planned for and set aside to support future industry and business growth.
2. Key industrial and commercial areas should be recognised and retained for their economic and employment contribution to local communities, regions and the State of Victoria.
3. Planning for industrial and commercial land should provide clarity and certainty about how and where industry and business can grow over time to support and guide long term investment and locational decisions.
4. Industry and business should be supported to innovate and operate efficiently and effectively now and into the future in areas identified for these purposes.

These key principles relate to a land use framework underpinned by:

- **State-significant industrial precincts**: Key regions which provide strategically located land for major industrial development linked to the Principal Freight Network and transport gateways. It is state policy that these areas are to be protected from incompatible land uses to allow continual growth in freight, logistics and manufacturing investment.

- **Regionally-significant industrial precincts**: These are key industrial areas that contribute significantly to local and regional economies. These areas need to be planned for and retained either as key industrial areas or locations that can transition to a broader range of employment opportunities. Criteria has been developed as a basis for identifying these locations.

- **Local industrial precincts**: If an area is not identified as being of state or regional significance, then it is of local significance. Councils are best placed to determine how these industrial areas are to be planned for. This could include identifying when industrial land should be retained, when it could transition to other employment generating uses, or if it is no longer required, when it could transition to other uses.
Section 1: Critical Review of the Draft MICLUP

Map 1.0.1: Existing and future industrial land, 2018

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning
Map 1.0.2: Southern Region future direction map – industrial land

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning
Implications

The key principles and framework point to the current plan to focus future industrial development into concentrated nodes with long term protection from alternative uses. The significant proportion of the Southern region supply that is listed as state significant or future state significant will limit the corridor’s options to support innovation as outlined in the fourth key principle.

A significant majority of Melbourne’s future industrial land is in the north and west, with the Port of Hastings designated as primarily for industries supporting deep water port activities.

The key principles and industrial designations imply that there will be changes to the current land use framework as provisionally outlined in the South East Growth Corridor Plan. This will make it difficult to achieve objectives for the Officer town centre and meet employment targets in the wider corridor.

The designation of Officer South as state significant future will delay the development of Officer South significantly and deprive the municipality of the required space to deliver a large enough catchment to support local white-collar jobs and combat low rates of employment self-sufficiency.
1.1 Review of Government Literature Supporting the MICLUP

DELWP summarises Victoria’s Industry Sector Strategies as such:

- **Advancing Victoria's Manufacturing: A Blueprint for the Future**
  - Outlines the vision for the Victorian manufacturing industry
  - Seeks to encourage industry growth by fostering innovation, developing a skilled labour pool, and creating a globally competitive business environment

- **Creative State**
  - Describes a plan to strengthen and grow Victoria’s creative industries
  - Contains 40 targeted actions to grow the state's creative and cultural economy and position Victoria as a globally recognised creative state.

- **Victoria's Health and Medical Research Strategy 2016-2020**
  - A plan supporting new and evolving fields of world-class medical research
  - Aims to create jobs and deliver economic benefits through strategic investments

- **Multiple Future Industries sector strategies**
  - Provide strategies to support investment in high-growth industries
  - through development projects, including establishing collaborative networks and building supply chains

DELWP outlines Victoria’s Future Industries Strategies as such:

- **Construction technologies**
  - Outline better ways of doing things in construction through technological advancement

- **Defence technologies**
  - Focus on improving defence technology, engaging with suppliers (including global suppliers) and winning future defence projects.

- **Food and fibre**
  - Concentrate on key areas along the food and fibre value chain, and emphasises business innovation through technology.

- **International education**
  - Focus on improving the international education sector by collaborating with a range of stakeholders and improving marketing efforts.

- **Medical technologies and pharmaceuticals**
  - Promotes growing the sector through a skilled workforce, health and medical research, and building business scale and capabilities.

- **New energy technologies**
- Encourages investment in clean energy generation technology and promoting new consumer-driven markets and expanding potential markets.

• Professional services
  - Focusses on engineering and design and financial services particularly through branding for the sector, attracting international investment, supporting industry networks and streamlining regulations

• Transport technologies
  - Advocates for the use of Victorian made transport infrastructure, investment in education to build new technologies and networking.

Freight and Logistics
- Victoria exported $29 billion worth of goods in 2017-18 and imported $89 billion worth of goods. Freight volumes are predicted to increase from around 360 million tonnes in 2014 to nearly 900 million tonnes by 2051.

- DELWP provides the following summary of the ‘Delivering the Goods’ strategy:
  - Review and enhance the Principal Freight Network (PFN)
    - Review and update the existing PFN to include significant freight places, shipping channels and over-dimensional routes.
    - Strengthen the protection of the PFN in the relevant planning schemes.
    - Assess the long term metropolitan industrial land needs and designate appropriate areas for the future.
    - Recognise the existing and planned regional intermodal terminals in the PFN.
    - With local councils, review existing, and identify and reserve sites for new freight terminals/precincts.
    - Reserve land for the locations of Victoria’s new interstate intermodal terminals – the Western Interstate Freight Terminal (WIFT) at Truganina and the Beveridge Interstate Freight Terminal (BIFT), and their connecting transport corridors. Include these land reservations in the new PFN.
    - Prepare a business case for the development of WIFT. Subject to the business case outcome, develop WIFT.
    - Protect Webb Dock and the existing and new transport corridor connections to the port under the new PFN.
  - Plan for Bay West as Victoria’s second container port whilst retaining the Port of Hastings as an option in reserve
    - Further investigate the feasibility of Bay West as a container port, including:
      ▪ Determining the location of the port site at Bay West.
      ▪ Identifying preferred land transport corridors and the required land area.
      ▪ Commence a baseline environmental program for the Bay West port site.
      ▪ Monitor key indicators to inform future decisions such as the size of container vessels.
    - Subject to study outcomes, progressively plan, reserve land, and prepare for development of Bay West as a container port.
Map 1.1.1: Key freight routes and facilities

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning
1.2 ‘Southern Region’ Context

The Southern Region comprises the municipalities of Cardinia, Casey, Frankston, Greater Dandenong, Kingston and Mornington Peninsula. It has the largest overall supply of zoned and unzoned industrial land supply across metropolitan Melbourne. However, the most significant growth corridor in region is in the south east, around Casey and Cardinia.

Key transport corridors such as Eastlink, Monash Freeway, Mornington Peninsula Freeway, the Princess Highway and Freeway, Nepean Highway, Western Port Highway, and the South Gippsland Freeway and Highway provide important connections throughout the region. Three rail lines provide connections to a large labour supply. While long term plans exist for the development of key infrastructure such as the Port of Hastings, a potential intermodal freight terminal at Lyndhurst, and the proposed South East Airport, the region is currently encumbered by significant disadvantages compared to the west and north in terms of market access.

In addition, the region has three metropolitan activity centres: Dandenong, Frankston and Fountain Gate-Narre Warren, which provide regional loci for civic services as well as retail and commercial activity.

The region currently has three state-significant industrial precincts (SSIPs), with additional current and future state and/or regionally significant industrial areas identified, which are listed below.
1.2.1 Key Industrial and Commercial Areas

The Southern state-significant industrial precinct (Southern SSIP):

- 2,957 hectares of zoned land which forms part of the Dandenong National Employment and Innovation Cluster (NEIC)
- Has access to significant transport infrastructure including rail freight connections and the key roads of Eastlink, Western Port Highway, the South Gippsland Highway and Freeway and Monash Freeway

The Officer-Pakenham state-significant industrial precinct (Officer-Pakenham SSIP):

- Has the largest area of industrial land in Cardinia, with development already occurring in the eastern most part of the SSIP near Pakenham.
- Most of the remaining land is currently unzoned and is required to undergo a PSP process.

The Hastings state-significant industrial precinct (Hastings SSIP):

- Contains a significant amount of vacant land with zoning provisions that require that any industrial use must be dependent on or gain significant economic advantage from proximity to deep water port facilities, be directly associated with such a use or be a marine service industry.
- To provide support for the development of the Port of Hastings if it is to become a major container port.

The Cranbourne West industrial precinct:

- A future industrial area according to the South East Growth Corridor Plan
- It is located approximately 2-3 kilometres south of the Southern SSIP and has access to the PFN along Western Port Highway
- Development is occurring in the northern portion of the precinct and a current proposal seeks to rezone a significant amount of the existing industrial land to residential land.
- This rezoning would reduce the stock of industrial land available in Casey by more than 20%.

The Casey Fields South future industrial precinct:

- A future industrial node according to the South East Growth Corridor Plan.
- With approximately 288 hectares of land identified for future industrial uses, it will have direct access to the South Gippsland Highway, a proposed railway station, and major activity centre to its north at Clyde.

The Thompsons Road Business Corridor:

- A future high amenity business precinct according to the South East Growth Corridor Plan.
- It will have access to the future major activity centre at Clyde North, the Principal Public Transport Network and a potential freight route along Thompsons Road with proper planning.

The Officer-Pakenham Business Corridor:

- A future high amenity business park according to the South East Growth Corridor Plan.
- Has excellent access to the PFN via the Princes Freeway, but is distant from currently activity freight and logistics nodes.
- To be located at Minta Farm and focus on a range of advanced manufacturing and commercial enterprises.

The Clayton South precinct:

- Located south of the Monash NEIC, the Victorian Planning Authority has been directed to undertake a planning project specific to the Clayton Business Park which will determine the future land uses.
The South Gippsland Highway Precinct:

- It has a high level of accessibility and comprises a range of warehousing and distribution uses as well as general manufacturing.
- Industrial precincts in Moorabbin and Clayton South:
  - Older, established industrial areas that are essentially fully developed.
- Industrial areas that support a range of manufacturing and services industries and restricted retailing, with good access to major roads.

Moorabbin Airport:

- Despite being Commonwealth land, it supports a range of aviation, light industry, logistics, office and retail uses.

The Mordialloc-Braeside industrial precincts:

- These precincts are well established with some vacant industrial land supply and accommodate a diverse range of industrial activities
- They have access to Moorabbin Airport, major road networks, and the proposed extension to the Mornington Peninsula Freeway.

Carrum Downs industrial area:

- Has a very limited industrial supply remaining in the precinct with no ability to expand.
- However, it has direct access to EastLink and the Mornington Peninsula Freeway.

The Seaford precinct:

- Although it is currently developed for a range of manufacturing, light industry and bulky goods retailing, there is a significant supply of Special Use Zone 1 land set aside for port related uses.

The Dandenong NEIC:

- Incorporates the Southern SSIP, the Dandenong Metropolitan Activity Centre, Dandenong Hospital and the Chisholm TAFE Precinct
- The Dandenong Metropolitan Activity Centre comprises approximately 405,000 square metres of commercial floorspace.

The Fountain Gate–Narre Warren Metropolitan Activity Centre:

- A regional centre with approximately 305,000 square metres of commercial floorspace with large areas of land for further expansion.
- The centre includes the Fountain Gate Shopping Centre as well as a range of other uses and has access to the eastern region of Victoria via rail and road links.

The Frankston Metropolitan Activity Centre:

- A regional centre comprising approximately 358,000 square metres of commercial floorspace.
- It has access to the Frankston railway line, EastLink, the Frankston Freeway, Moorooduc Highway, and Nepean Highway.

The broader activity centre network across the region:

- Comprises 20 existing major activity centres and two identified future major activity centres.
- Larger free-standing shopping centres include Casey Central, Cheltenham-Southland, Keysborough-Parkmore, and Karingal.
- Strip-based centres include Cranbourne, Mentone, Mornington and Springvale.
1.3 Supply and Demand for Industrial Land

Sixty-Five percent of unzoned identified industrial land is located within one of three SSIPs (Western, Northern and Officer-Pakenham). The remaining 35% is in key industrial areas.

Approximately 280 hectares of industrial land per annum was consumed across metropolitan Melbourne on average from 2015-16 to 2017-18, with the largest single share being developed in the Western SSIP.

There is an expected supply of approximately 23 years of zoned industrial land and around 15 years of unzoned industrial land (38 years in total).

Table 1.3.0.1: Industrial land supply, 2018

<table>
<thead>
<tr>
<th>Region / SSIP</th>
<th>Occupied zoned land (ha)</th>
<th>Vacant zoned land (ha)</th>
<th>Future unzoned land (ha)</th>
<th>Total vacant zoned and unzoned land supply (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inner Metro Region</td>
<td>424.8</td>
<td>28.0</td>
<td>0.0</td>
<td>28.0</td>
</tr>
<tr>
<td>Western Region</td>
<td>5,820.5</td>
<td>2,678.3</td>
<td>2,770.2</td>
<td>5,448.5</td>
</tr>
<tr>
<td>Western SSIP</td>
<td>4,410.6</td>
<td>1,830.6</td>
<td>1,033.8</td>
<td>2,864.4</td>
</tr>
<tr>
<td>Northern Region</td>
<td>3,718.6</td>
<td>1,282.7</td>
<td>2,074.7</td>
<td>3,357.4</td>
</tr>
<tr>
<td>Northern SSIP</td>
<td>2,459.3</td>
<td>1,002.1</td>
<td>1,923.0</td>
<td>2,925.1</td>
</tr>
<tr>
<td>Eastern Region</td>
<td>2,437.0</td>
<td>135.6</td>
<td>0.0</td>
<td>135.6</td>
</tr>
<tr>
<td>Southern Region</td>
<td>7,278.6</td>
<td>2,339.0</td>
<td>1,183.5</td>
<td>3,522.5</td>
</tr>
<tr>
<td>Southern SSIP</td>
<td>2,454.4</td>
<td>502.6</td>
<td>0.0</td>
<td>502.6</td>
</tr>
<tr>
<td>Officer-Pakenham SSIP</td>
<td>317.7</td>
<td>341.6</td>
<td>938.8</td>
<td>1,279.9</td>
</tr>
<tr>
<td>Hastings SSIP</td>
<td>814.1</td>
<td>578.1</td>
<td>0.0</td>
<td>578.1</td>
</tr>
<tr>
<td>Inner South East Region</td>
<td>140.7</td>
<td>2.3</td>
<td>0.0</td>
<td>2.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>19,815.2</strong></td>
<td><strong>6,465.9</strong></td>
<td><strong>6,028.4</strong></td>
<td><strong>12,494.3</strong></td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018
1.3.1 Regional Supply and Demand for Industrial Land

The Southern region currently has a total (zoned and unzoned vacant land) industrial land supply of 3,522.5 hectares, 66.4% (2,339 hectares) of which is zoned. 54.4% (1,917.5 hectares) of the total supply is in Casey and Cardinia, with 38.3% (734 hectares) of the Casey and Cardinia supply already zoned. Thirty-seven percent (1,304.8 hectares) of the total is in Cardinia alone, with 28.1% (366.5 hectares) of the supply in Cardinia is zoned. All of the unzoned land in Cardinia is located in the Officer-Pakenham SSIP. The Officer-Pakenham SSIP accounts for 36.3% (1,279.9 hectares) of the total Southern region supply. 26.7% (341.6 hectares) of the Officer-Pakenham SSIP supply is zoned.

The Southern region has had an industrial land take-up of around 107 hectares per year from 2015-2016 to 2017-2018, with consumption rates having been higher than this over the last two years (reaching 110 hectares during the period 2017-18). Casey-Cardinia accounts for around 20% of the average take-up (approximately 21.5 hectares per year), with Cardinia alone producing 13.3% (14.2 hectares per year) of the Southern region’s land consumption. The Officer-Pakenham SSIP has produced an average land consumption of 13.9 hectares per year, 13.0% of the Southern region’s total.

If these take-up rates remain constant, there should be around 33 years of supply in the Southern region, 22 years of which are already zoned for industrial use. However, removing the Mornington Peninsula zoned Special Use Zone 1 (approximately 980 hectares) from the calculation reduces the land supply by around 9 years. MICLUP predicts a potential 7 years of supply from unzoned land, but around 11 years of further supply can be calculated through the division of the amount of unzoned land (1,183.5 ha) by the land consumption (107 ha/year). Their method of calculation is not provided.

Casey and Cardinia would have around 89 years of supply, 34 years of which is zoned. Cardinia alone would have around 92 years of supply, 28 years of which have been zoned, and the Officer-Pakenham SSIP would have around 92 years, 25 years having already been zoned.

However, these figures are based on a number of assumptions such as constant take-up rates and a lack of demand transfer. It is likely that take-up rates will be affected by other factors, such as the preferred location of businesses (based on access to key points in their supply chains, cost, etc.).

The MICLUP assumes that once the land supply in the Southern SSIP is exhausted (estimated to be by the mid-2020s), demand will be transferred to the closest industrial areas (e.g. Braeside and Cranbourne West) and then further out into the Officer-Pakenham SSIP.

There is currently strong demand from the manufacturing sector for industrial land in the Southern region, especially in the Southern SSIP where it represented around 32% of workplaces in 2016-17 (compared to 22% across Melbourne). From these numbers, the MICLUP concluded that manufacturing operations will continue to drive demand for land within the Southern region. They also predict that the strong projected population growth in the region will increase the demand for land from the freight, logistics and warehouse sectors.
Table 1.3.1.1:  Industrial land supply, Southern Region, 2018

<table>
<thead>
<tr>
<th>Council / SSIP</th>
<th>Zoned occupied (ha)</th>
<th>Zoned vacant (ha)</th>
<th>Future supply (ha)</th>
<th>Total available supply (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardinia</td>
<td>380.9</td>
<td>366.5</td>
<td>938.3</td>
<td>1,304.8</td>
</tr>
<tr>
<td>Casey</td>
<td>670.7</td>
<td>367.5</td>
<td>245.2</td>
<td>612.7</td>
</tr>
<tr>
<td>Frankston</td>
<td>371.7</td>
<td>21.6</td>
<td>0.0</td>
<td>216.6</td>
</tr>
<tr>
<td>Greater Dandenong</td>
<td>2,448.2</td>
<td>469.6</td>
<td>0.0</td>
<td>469.6</td>
</tr>
<tr>
<td>Kingston</td>
<td>1,273.3</td>
<td>75.9</td>
<td>0.0</td>
<td>75.9</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>2,184.8</td>
<td>1,037.9</td>
<td>0.0</td>
<td>1,037.9</td>
</tr>
<tr>
<td><strong>Southern Region</strong></td>
<td><strong>7,273.6</strong></td>
<td><strong>2,339.0</strong></td>
<td><strong>1,183.5</strong></td>
<td><strong>3,522.5</strong></td>
</tr>
<tr>
<td>Southern SSIP</td>
<td>2,454.4</td>
<td>502.6</td>
<td>0.0</td>
<td>502.6</td>
</tr>
<tr>
<td>Officer-Pakenham SSIP</td>
<td>317.7</td>
<td>341.6</td>
<td>938.3</td>
<td>1,279.9</td>
</tr>
<tr>
<td>Hastings SSIP</td>
<td>814.1</td>
<td>578.1</td>
<td>0.0</td>
<td>578.1</td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018

Table 1.3.1.2:  Industrial land consumption, Southern Region, 2015-16 to 2017-18

<table>
<thead>
<tr>
<th>Council / SSIP</th>
<th>2015-16 (ha)</th>
<th>2016-17 (ha)</th>
<th>2017-18 (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardinia</td>
<td>15.1</td>
<td>12.8</td>
<td>14.8</td>
</tr>
<tr>
<td>Casey</td>
<td>4.1</td>
<td>7.8</td>
<td>9.4</td>
</tr>
<tr>
<td>Frankston</td>
<td>10.6</td>
<td>8.7</td>
<td>8.3</td>
</tr>
<tr>
<td>Greater Dandenong</td>
<td>53.7</td>
<td>74.2</td>
<td>57.5</td>
</tr>
<tr>
<td>Kingston</td>
<td>14.6</td>
<td>2.8</td>
<td>13.4</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>3.9</td>
<td>3.0</td>
<td>6.8</td>
</tr>
<tr>
<td><strong>Southern Region</strong></td>
<td><strong>102.0</strong></td>
<td><strong>109.3</strong></td>
<td><strong>110.2</strong></td>
</tr>
<tr>
<td>Southern SSIP</td>
<td>55.9</td>
<td>71.4</td>
<td>63.3</td>
</tr>
<tr>
<td>Officer-Pakenham SSIP</td>
<td>15.5</td>
<td>12.4</td>
<td>13.9</td>
</tr>
<tr>
<td>Hastings SSIP</td>
<td>0.0</td>
<td>0.0</td>
<td>-3.6</td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning, Urban Development Program – Melbourne Metropolitan Industrial 2018
Implications
The significant supply and infrastructure development planned in the west and north are likely to absorb most of the freight and logistics demand, especially as the intermodal freight facilities in the area begin development.

The report has an expectation that regionally significant and large format uses would progress to the Officer-Pakenham SSIP. However, given the much smaller size and restricted workforce of the Officer/Pakenham Corridor it is likely to primarily attract demand from local industry requiring support industry such as warehousing over the next few decades.

This plan will require local stakeholders to push against state-level policy to justify logical, more economically valuable uses and/or more mixed-use space to make their developments viable. This will further slow the development of the precinct until the development of major supporting infrastructure such as a port or airport.

The report lists access to the Officer-Pakenham corridor as great via its proximity to freeways and highways but fails to address travel times and distances associated with travelling to the precinct, which is 55km from the CBD, 20km further than the Southern SSIP. These have significant implications for the attractiveness of the precinct.
1.4 Supply and Demand for Commercial Land

The Western, Southern and Northern Regions are estimated to require up to a 50% increase in their supply of commercial floorspace, with need concentrated in the growth area municipalities. Just over 1,560 hectares of land has been identified for future commercial purposes, over half of which is in the Southern Region.

Table 1.4.0.1: Commercial land supply, 2018

<table>
<thead>
<tr>
<th>Region</th>
<th>Existing floorspace 2018 (m²)</th>
<th>Additional floorspace required 2016 to 2031 (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inner Metro</td>
<td>9,098,350</td>
<td>4,515,000</td>
</tr>
<tr>
<td>Western</td>
<td>2,909,700</td>
<td>1,378,700</td>
</tr>
<tr>
<td>Northern</td>
<td>3,239,150</td>
<td>1,691,100</td>
</tr>
<tr>
<td>Eastern</td>
<td>2,958,000</td>
<td>1,198,500</td>
</tr>
<tr>
<td>Southern</td>
<td>3,250,550</td>
<td>1,631,700</td>
</tr>
<tr>
<td>Inner South East</td>
<td>2,990,000</td>
<td>984,700</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>24,445,750</strong></td>
<td><strong>11,899,700</strong></td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning
1.4.1 Regional Supply and Demand for Commercial Land

There is a total of 884 hectares of land in the Southern region that has been identified as being zoned for commercial purposes, with almost 3.3 million square metres of floorspace used for or available for commercial purposes. Around 28% of this floorspace (925,000 m²) is in Casey and Cardinia, with 6% of the Southern region’s commercial floorspace (206,700 m²) in Cardinia alone.

MICLUP identified a total of 217 commercial areas or centres in the Southern region, 172 of which have less than 10,000 square metres of floorspace and 7 of which have more than 100,000 square metres of floorspace. Casey and Cardinia have a combined total of 50 centres, with Cardinia having the fewest (16) of the councils in the region.

Table 1.4.1.1: Existing commercial floorspace by centre size, Southern Region, 2018

<table>
<thead>
<tr>
<th>Council</th>
<th>Less than 2,000 (m²)</th>
<th>2,000 to 9,999 (m²)</th>
<th>10,000 to 49,999 (m²)</th>
<th>50,000 to 99,999 (m²)</th>
<th>Greater than 100,000 (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No. of centres</td>
<td>Floor-space (m²)</td>
<td>No. of centres</td>
<td>Floor-space (m²)</td>
<td>No. of centres</td>
</tr>
<tr>
<td>Casey</td>
<td>10</td>
<td>11,900</td>
<td>15</td>
<td>87,050</td>
<td>7</td>
</tr>
<tr>
<td>Frankston</td>
<td>17</td>
<td>18,050</td>
<td>14</td>
<td>56,200</td>
<td>2</td>
</tr>
<tr>
<td>Greater Dandenong</td>
<td>25</td>
<td>26,200</td>
<td>6</td>
<td>24,100</td>
<td>3</td>
</tr>
<tr>
<td>Kingston</td>
<td>23</td>
<td>24,700</td>
<td>16</td>
<td>72,500</td>
<td>8</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>22</td>
<td>20,150</td>
<td>13</td>
<td>59,800</td>
<td>7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>104</strong></td>
<td><strong>102,100</strong></td>
<td><strong>68</strong></td>
<td><strong>321,350</strong></td>
<td><strong>31</strong></td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning

MICLUP was also able to identify an additional 800 hectares of land that has been assigned for future commercial purposes through other strategic plans (such as Growth Corridor Plans and PSPs), all of which is in Casey and Cardinia. Some of this land (170 hectares in Casey and 320 hectares in Cardinia) is set aside for future business precincts which will include some non-commercial uses (including some industrial and residential). These future business precincts will consume over 60% of all of the identified future commercial land in the Southern region (and over 50% of the future supply for the entire metropolitan area).

MICLUP has calculated that an additional 1.6 million m² of commercial floorspace will be required across the Southern Region by 2031, 45% (720,600 m²) of which will be needed for office use and 57% (911,100 m²) of which will be for retail. Casey and Cardinia is predicted to require almost half of this floorspace and already have 800 hectares of land identified for future commercial purposes.
Section 1: Critical Review of the Draft MICLUP

Table 1.4.1.2: Future commercial land supply, Southern Region

<table>
<thead>
<tr>
<th>Council</th>
<th>Future commercial land (ha)</th>
<th>Share of metropolitan Melbourne</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardinia</td>
<td>461</td>
<td>30%</td>
</tr>
<tr>
<td>Casey</td>
<td>339</td>
<td>22%</td>
</tr>
<tr>
<td>Total</td>
<td>800</td>
<td>51%</td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning

Table 1.4.1.3: Commercial floorspace supply and requirement, Southern Region

<table>
<thead>
<tr>
<th>Council</th>
<th>Existing commercial floorspace 2018 (m2)</th>
<th>Commercial floorspace required 2016 to 2031 (m2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardinia</td>
<td>206,700</td>
<td>249,100</td>
</tr>
<tr>
<td>Casey</td>
<td>718,300</td>
<td>546,300</td>
</tr>
<tr>
<td>Frankston</td>
<td>568,400</td>
<td>112,900</td>
</tr>
<tr>
<td>Greater Dandenong</td>
<td>653,900</td>
<td>258,800</td>
</tr>
<tr>
<td>Kingston</td>
<td>596,400</td>
<td>293,200</td>
</tr>
<tr>
<td>Mornington Peninsula</td>
<td>506,850</td>
<td>171,400</td>
</tr>
<tr>
<td>Total</td>
<td>3,250,550</td>
<td>1,631,700</td>
</tr>
</tbody>
</table>

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning

Table 1.4.1.4: Commercial floorspace requirement by type and municipality, Southern Region, 2016 to 2031

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Environment, Land, Water and Planning
The report identifies the Casey-Cardinia area as primary drivers for commercial land demand, with identified land to be almost exhausted prior to 2031. If population growth continues post 2031 in line with Victoria in Future forecasts (2019) the region will grow by 10% between 2031 and 2036, adding over 60,000 residents. Based on this growth, additional commercial space will need to be allocated to support this growth and growth post 2036.
1.5 Projected Growth in Employment

Figure 1.5.0.1 provides key insights into the employment expectations to 2031 in the MICLUP. It presents job forecasts by industry by region. In the Southern region, an additional 132,000 jobs are forecasts to be created between 2016 and 2031, but what is key to note is the distribution of those jobs by industry.

Approximately 95% of the jobs forecast in the Southern region are in a services, retail or construction industry, with a very small number of ‘manufacturing and industrial’ jobs overall. Additionally, The MICLUP lists Manufacturing as a key industry but does not include Freight and logistics. This is likely due to the relatively low job density that the industry creates and lower relevance the area has to the future freight network of Melbourne.

Figure 1.5.0.1: Projected employment growth, metropolitan Melbourne, 2016 to 2031

![Projected employment growth, metropolitan Melbourne, 2016 to 2031](image)

Source: Melbourne Commercial and Industrial Land Use Plan, Department of Jobs, Precincts and Regions

Figure 1.5.0.2 from the MICLUP on the following page breaks up the Southern region into its constituent municipalities, presenting the same breakdown of employment forecasts by industry. It shows that in the Casey-Cardinia area, approximately 10% of employment growth is expected to occur in ‘manufacturing and industrial’ jobs.

The implications of this for Casey/Cardinia and Officer south are that the workforces developing in their municipalities do not match the distribution of land use types in the MICLUP. This puts the Southeast corridor at risk of having a large proportion of ‘theoretical jobs’ relative to active jobs. This is accentuated by the likely
exhaustion of commercial and residential land in the municipalities within 15 years, relative to the close to 40 years of supply of industrial land including demand transfer.

Figure 1.5.0.2: Projected employment growth, Southern Region, 2016 to 2031

In addition to the growth shown in figure 26, significant growth is expected to occur in the area 2031-2036, the end of the forecast period. This would suggest that demand for non-industrial space will continue past the date it is likely to be exhausted. This will necessitate the conversion of some industrial space to mixed use or residential to enable this growth.
1.6  Planning framework for industrial and commercial land across the Southern Region

The MICLUP report’s view on the provision of Industrial land centres on the protection of existing SSIPs with the view that most of the current areas are nearing capacity. It stresses that methods of maximising the efficiency of land usage in these areas should be considered.

The report refers to new industrial areas that have been ‘set aside’, with the priority being to have sites available for large format uses when space at other locations runs out. It notes that supply in Hastings is restricted to port related uses.

It then notes that there is increasing pressure from demand for non-industrial land uses in the area. It asserts however that the key reason for conserving industrial land is to preserve employment opportunities, especially in growth areas.

The report underlines the importance of ensuring that industrial land continues to support the regional economy, with the focus being on ensuring the delivery of 20-minute neighbourhoods. Significantly the report outlines the importance of ensuring there is enough land allocated to business precincts to generate knowledge-based jobs in the region. The importance of ensuring adequate provision of commercial land to accommodate demand in the longer term is established in this section.

The following key guidelines for regional planning are given:

• Retain regionally-significant industrial precincts as identified on the future directions map for the region and protect them from encroachment from sensitive uses that may compromise development and efficient operation of businesses in these locations.

• Retain industrial land at Clayton South, Moorabbin, Moorabbin Airport, Braeside, Carrum Downs, Seaford, Cranbourne West and Casey Fields South predominately for industrial uses, limit encroachment by other uses that would fragment this land and protect them from encroachment of sensitive uses that may compromise development and efficient operation of businesses in these locations.

• Investigate and identify areas within regionally-significant industrial precincts that could support other employment uses, including offices, creative industries and start-ups, that support or are well connected to adjacent employment uses or transport connections.

• In consultation with the Port of Hastings Development Authority, investigate the potential for any Special Use Zone 1 land outside of the Hastings SSIP that could allow for a broader range of industrial uses.

• Ensure appropriate land and infrastructure is made available to support industry needs and economic growth.
• Support the development of growth area business precincts for predominately commercial development providing for higher order, knowledge-based jobs and businesses.

• Identify existing activity centres where commercial development should be prioritised to accommodate future needs.

• Ensure that planning for future activity centres in growth areas makes adequate provision to accommodate longer-term commercial and employment needs.

**Implications**

This section of the report outlines the key objectives of the current land use plan. The key implication for the southern region as a whole is that its key industrial and commercial districts currently operating are unlikely to see large scale encroachment from other use types.

The report's statement that the region is already feeling the pressure from demand for non-industrial land uses indicates that there is a sensitivity towards ensuring that the wider needs of the corridor are not overlooked, which includes ensuring that there is enough commercial land supply in the medium and longer term.

The report points out that the key underlying goal behind their decision to ‘set aside’ some currently non-industrial areas for industrial use is to maintain long term employment opportunities. The report does not consider the timeline of the delivery of these opportunities.

The report outlines a specific interest in knowledge-based jobs, which requires both public and private engagement in fringe areas such as Officer South.

The key guidelines of the report outline specific areas where industrial land is to be retained, which doesn’t include Officer South. The guidelines also include a commitment to investigate and identify areas that could support other employment uses (i.e. offices, creative industries and innovation industries.) in areas with good connection to the transport network, such as in Officer South.
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Section 2: Case Study – Demand Modelling
This section forms an update to Macroplan’s previous report *Southeast Growth Corridor: Employment and Economic Analysis*. This report will revise our previous work with updated estimates from the Draft MCLUP.

The key finding of that report was that the precinct in Officer South would produce immediate economic outcomes and significantly faster growth in a scenario which included a greater mix of uses. This compared to a business as usual scenario where the land south of Lecky road was not taken up in the forecast period (2019-2031). This report will examine whether this remains the case in 2019 and test an alternative Public Private Partnership (PPP) scenario.

The secondary benefit of the development of coordinated, high density, high value employment clusters is that it addresses a significant need in Cardinia, which is to provide local employment for the primarily white collar residents of the area, who overwhelmingly must travel to other municipalities to work. This will continue to prevent Cardinia from achieving the state planning objective of developing ‘20-minute neighbourhoods’ until the problem is addressed at the strategic level.

There are two key data inputs which are important to consider in order to model demand for land in the Southern Region, they are:

- Take up rates of industrial and commercial land
- Population growth.

This report will examine two scenarios based on the official forecasts for the above inputs as outlined in the Draft Melbourne Industrial and Commercial Land Use Plan:

1. Business as Usual: The Officer South area is left as a mixed-use precinct in the north and an exclusively industrial area in the south.
2. A public private partnership (PPP) process is engaged in order to develop a precinct with diverse and advanced industries.

This will be modelled on the assumption of a different land use makeup, but as if like-for-like land uses are economically identical. We note that this will bias the analysis in favour of the business as usual scenario as the area is not likely to be attractive to the primary component of industrial land development in Melbourne: Freight and logistics.

### 2.1 Assumptions

The following base assumptions have changed between this report and our previous report:

- Figures for Industrial supply and take-up have been updated to reflect those found in the Draft MCLUP.
2.2 Economic Context

As detailed in our previous report, Cardinia has a significant deficit of the type of jobs occupied by its residents. This has led to a situation where over two-thirds of people in Cardinia leave the municipality daily for work. Additionally, the location of their places of work are quite distant. Far from a 20-minute neighbourhood, significant numbers of Cardinian residents travel over 90 minutes to locations such as the CBD, Monash and Kingston.

The reason for this is that it is very difficult to find affordable housing in the region, which makes Cardinia a logical choice for young families. However, this has resulted in workers from industries not operating in Cardinia to move there out of necessity.

Figure 2.2.0.1: Major Job Outflow Destinations, Cardinia, 2016

![Map showing job outflow destinations in Cardinia](image)

<table>
<thead>
<tr>
<th>Journey to Work Destination (LGA)</th>
<th>Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casey (C)</td>
<td>6,615</td>
</tr>
<tr>
<td>Greater Dandenong (C)</td>
<td>5,398</td>
</tr>
<tr>
<td>Monash (C)</td>
<td>2,686</td>
</tr>
<tr>
<td>Melbourne (C)</td>
<td>2,193</td>
</tr>
<tr>
<td>Knox (C)</td>
<td>1,903</td>
</tr>
<tr>
<td>Kingston (C)</td>
<td>1,273</td>
</tr>
</tbody>
</table>

Source: ABS Census 2016

The lack of white-collar jobs in Cardinia can be attributed to the lack of planning for large format anchors (i.e. hospitals, specialised economic clusters) to generate high value knowledge-based jobs. Without the correct pre-existing conditions, fringe locations such as Cardinia have little hope of spontaneously developing large-scale white-collar job opportunities that people want to work.

It is important to note that simply providing a potential white-collar job will not solve the problem Cardinia is facing, because it needs to provide the right white-collar opportunities to attract the types of workers that are moving to Cardinia. This generally means that there must be some opportunity for professional advancement available in the area. These opportunities are most commonly generated by complex, prestigious and/or large companies and the public service.
The draft MCLUP comes at a time of transition in the Southern Region, a key critique of which is that the report seems to fail to acknowledge the rapidly dropping number of jobs per hectare provided in industrial areas. Figure 2.2.0.2. below demonstrates this trend. Note the large drop in Manufacturing and wholesale trade employment compared to the increase in Transport, postal and warehousing. This considered in the context of growing demand for industrial land, expanding SSIPs and planning for huge industrial land banks. It is in the best interest of planners to maximise public benefit and productivity in this case in order to make current regional policy maxims achievable. Our previous report noted that job density and productivity are intrinsically linked. Specifically, for every doubling of job density, there is a 13% increase in productivity.

**Figure 2.2.0.2: Change of Employment by Industry**

<table>
<thead>
<tr>
<th>Industry</th>
<th>Jobs 2016</th>
<th>Jobs 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>6,095</td>
<td>9,518</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>5,436</td>
<td>9,498</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>3,180</td>
<td>1,941</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>3,004</td>
<td>1,686</td>
</tr>
<tr>
<td>Education and Training</td>
<td>2,860</td>
<td>1,359</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>2,641</td>
<td></td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>1,946</td>
<td></td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td>856</td>
<td></td>
</tr>
<tr>
<td>Other Services</td>
<td>528</td>
<td></td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>402</td>
<td></td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td>396</td>
<td></td>
</tr>
<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>Rental, Hiring and Real Estate Services</td>
<td>-3,194</td>
<td></td>
</tr>
<tr>
<td>Electricity, Gas, Water and Waste Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mining</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ABS (2016), Macroplan (2019)

This shows that we are moving into a future where industrial land is a relatively lower value land use that generates relatively few jobs per hectare and does not have the ability to underpin development of large precincts on its own. In fact, in 2018, just 11% of industrial leases signed were by manufacturing firms, compared to 49% signed by freight and logistics firms.

Freight and logistics operations are a literal stopover between two points on the supply chain and therefore are not themselves anchors or generators of significant primary economic activity but can only be anchored by external factors such as ports and airports and final demand from consumers.

This opens the southern region up to comparison to the west of Melbourne, which as outlined in the Draft MCLUP, is far better suited to house the growing freight and logistics needs of the city via its connections to the upcoming Bay West, Western interstate freight terminal, Beveridge interstate freight terminal, the port of Melbourne, Melbourne Airport and Avalon Airport. It should also be noted that employment projections produced by the Department of Jobs and Small Business expect the trend of manufacturing jobs being replaced with lower density freight and logistics jobs will continue over their study period in the Southern Region.
2.3 Business as Usual

Our previous report outlined what we spatially defined as a Business as Usual or Trend Growth. This scenario closely reflects the plan outlined in the Draft MICLUP.

Figure 2.3.0.1: Projected employment growth, Base Case, Southern Region, 2016 to 2031

The land south of Lecky Road Remains Industrial and take-up rates reflect the current rate until the exhaustion of the southern SSIP, after which 30% of demand from the Southern SSIP is transferred to Officer-Pakenham. The updated figures in the Draft MICLUP suggest that 14 Ha of industrial land is taken up in Officer/Pakenham per annum, compared to 110ha in the Southern Region.

This results in take-up of approximately 281 ha of land in the Officer/Pakenham corridor by 2031. At this rate of consumption, the Officer/Pakenham corridor has over 40 years of theoretical supply. This does not account for the strong likelihood of the area not fitting the requirements of freight and logistics demand unless there is a significant change in the infrastructure network (i.e. the Port of Hastings).

Under this scenario, it is unlikely that the land south of Lecky Road will be subject to significant take-up prior to 2035. At this time there will be minimal population growth given that residential land supply will have been exhausted. This will cause the area to struggle to find a large enough workforce to be sustainable.

The mixed-use precinct will be in demand by the mid-2020s primarily for its residential aspect, as greenfield land in the corridor becomes scarcer. This will drive population-dependent industry in the area that will further accelerate the growth of the district, especially given that the jobs provided in this area are likely to more closely resemble the primarily white-collar workforce in the area.

Based on our modelling, this scenario would deliver 33,640 jobs in the long term, with 19,040 jobs (100% of the mixed use) active in 2031.
2.4 Public-Private Partnership

This model is based on Macroplan’s previous report: Officer South Land Use: Conceptual Analysis. Wherein we outline a variety of large format uses that could be developed in Officer South to maximise employment and economic outcomes for the corridor. The precinct in this scenario includes some additional land uses alternative to the currently proposed land use distribution with their inclusion and magnitude based on the expected exhaustion of those land supplies relative to the supply of industrial land over the period.

This means that the precinct supports some additional residential and key anchor hub uses on land currently proposed to become industrial. An example of what this type of precinct can look like is outlined in the map below:

Figure 2.4.0.1: A Vision for Officer South Including Anchor Clusters

The development of these anchor use concepts is dependent on joint action from both the public and private sector, but would deliver uses that would redefine the precinct as a hub of innovation and drive higher density employment outcomes and demand for space from ancillary and supporting industries.

This scenario includes the development of:

- A medical hub including a hospital, specialised research facilities, wet labs, retirement and aged care.
- Specialised business parks such as a ‘CleanTech’ facility
- And Agricultural Hub in the south to interface with the large foodbowl to the south and east
Most of the area remaining as entirely industrial for supporting advanced manufacturing and freight and logistics. Under this scenario, take-up would be driven by the PPP process, which could, in conjunction with developers could lead to significant development within 5-10 years. This will be primarily driven by large format high complexity land uses which become achievable at the strategic level.

Once key developments have been commenced, the remainder of the precinct will be driven by these key hubs in combination with mixed use development. This is due to the relative lack of residential land supply in the southeast and the large labour pool available to white collar industry.

The high rate of population growth in combination with industry needs from the hubs will also create growing final demand for freight and logistics, bringing forward the development of industrial land in Officer south.

Figure 2.4.0.2: Long Term Employment Estimates, Officer South, PPP Model

<table>
<thead>
<tr>
<th>Land Use</th>
<th>Gross Land Area</th>
<th>Jobs/Ha</th>
<th>Total Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial</td>
<td>435</td>
<td>20</td>
<td>8,700</td>
</tr>
<tr>
<td>Primary School/Community/Active Open Space</td>
<td>15</td>
<td>1</td>
<td>40</td>
</tr>
<tr>
<td>Hi-Tech Research/Education/Mixed Use</td>
<td>48</td>
<td>280</td>
<td>13,440</td>
</tr>
<tr>
<td>Local Convenience Retail</td>
<td>n/a</td>
<td>n/a</td>
<td>100</td>
</tr>
<tr>
<td>Business Employment</td>
<td>90</td>
<td>158</td>
<td>14,220</td>
</tr>
<tr>
<td>Residential</td>
<td>110</td>
<td>0.1</td>
<td>432</td>
</tr>
<tr>
<td>Office/Mixed Use</td>
<td>150</td>
<td>56</td>
<td>8,400</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>848</strong></td>
<td><strong>53.5</strong></td>
<td><strong>45,332</strong></td>
</tr>
</tbody>
</table>

Source: Macroplan (2019)

Figure 2.4.0.2 presents our employment forecasts for a fully built out Officer South precinct following the PPP model. The PPP model delivers 45,332 jobs, approximately 11,700 more jobs than the business as usual model. This is considered a conservative estimate as it does not include workers that work from home or at no fixed address, nor does the precinct use as much raw greenfield, providing space for natural features.

2.5 Conclusion

Our model shows that some employment space can be sacrificed while generating a greater number of employment opportunities. The earlier noted limitation should also be considered, that the value of jobs in the PPP model are likely to be significantly higher on average. The other point that this analysis did not cover was the timing of the industrial jobs. In both scenarios, the majority of the industrial land will see little to no take up prior to 2031.

This report underlines the key directive outlined in the draft MICLUP to ensure that land use needs to maximise job efficiency in key areas with constrained land supply.